

**ORIGINAL CANADIAN GIFT PLANNING COURSE
BANFF CENTRE
October 16 - 21, 2011
A G E N D A**

❖ **SUNDAY OCTOBER 16**

- 2:30 - 4:30 p.m. **Registration of students & pick up textbook**
- 5:30- 6:30 p.m. **Dinner (buffet)**
- 6:30 – 8:30 p.m. **Welcome and Opening Reception (courtesy of CAGP)
Introductory Session – The Field of Gift Planning**

❖ **MONDAY OCTOBER 17**

- 7:00 - 8:30 a.m. **Breakfast (buffet)**
- 8:30- 10:30 a.m. *Tax Aspects of Charitable Giving in Canada*
- 10:30 – 10:45 a.m. **Break**
- 10:45 – 12:15 p.m. *Tax Aspects* continued
- 12:15 p.m. – 1:00 **Lunch**
- 1:00 – 2:15 Assignment #1
- 2:15 – 2:45 Review of Assignment # 1
- 2:45 - 3:00 p.m. **Break**
- 3:00 - 4:00 p.m. *Charitable Bequests*
- 4:00 - 4:15 p.m. **Break**
- 4:15 - 5:00 p.m. *Charitable Bequests continued*
- 5:00 – 5:30 p.m. Groups meet for Assignment #2
- 5:30 – 6:00 p.m. Review of Assignment #2
- 6:00 - 7:30 p.m. **Dinner and free evening.**

❖ **TUESDAY OCTOBER 18**

- 7:00 - 8:30 a.m. **Breakfast (buffet)**
- 8:30 - 10:00 a.m. *Gifts of Life Insurance*
- 10:00 – 10:15 a.m. **Break**
- 10:15 – 11:30 p.m. *Charitable Gift Annuities*
- 11:30 – 12:00 p.m. Class Photograph
- 12:00 - 1:00 p.m. **Lunch (buffet)**
- 1:00 – 2:00 p.m. Assignment #3 (Life Insurance and Annuities)
- 2:00 – 2:30 p.m. Review of Assignment #3
- 2:30 – 4:00 p.m. *Cultivation & Solicitation*
- 4:00 - 4:15 p.m. **Break**
- 4:15 – 5:00 p.m. *Cultivation & Solicitation* continued
- 5:00 – 6:30 p.m. **Dinner and Free Evening**

❖ **WEDNESDAY OCTOBER 19**

- 7:00 - 8:30 a.m. **Breakfast (buffet)**
- 8:30 - 9:45a.m. *Gifts of Publicly-Traded Securities*
- 9:45 - 10:00 a.m. **Break**
- 10:00 – 11:00 a.m. *Endowments*
- 11:00 – 11:15 a.m. **Break**
- 11:15 – 12:00 p.m. *Major Gifts, Gift Planning and Direct Marketing*
- 12:00 – 1:00 p.m. **Lunch (buffet)**
- 1:00 – 2:00 p.m. Assignment #4 Security/Endowments
- 2:00 – 2:30 p.m. Review of Assignment #4
- 2:30 - 2:45 p.m. **Break**
- 2:45 – 4:15 p.m. *Marketing*
- 4:15 – 5:30 p.m. Marketing Plan Assignment #5

5:30 - 6:30 p.m. **Dinner**
7:00 – 8:30 p.m. Fire-Side Chat: *Open Dialogue Session*

❖ **THURSDAY OCTOBER 20**

7:00 - 8:30 a.m. **Breakfast with your Group, Faculty will attend and move about to Review Marketing Plans**
8:30 - 9:45 a.m. *Advanced Topics (Tax Aspects)*
9:45 - 10:00 a.m. **Break**
10:00 – 11:15 a.m. *Recognition & Stewardship*
11:15 – 12:30 p.m. *Starting and Administering a Gift Planning Program*
12:30 – 1:30 p.m. **Lunch (Boxed Lunches)**
Case Studies Assignment #6
6:00 – 7:30 p.m. **Dinner and Free Evening**

❖ **FRIDAY OCTOBER 21**

7:00 – 8:30 a.m. **Breakfast (buffet)**
8:30 – 9:30 a.m. Ethics
9:30 – 10:15 a.m. The Human Side and End of Life Issues
10:15 – 10:45 **Break and Check Out of Guestroom**
10:45– 12:30 p.m. Case Studies (all groups)
12:30 – 1:30 p.m. **Closing lunch (Buffet). Departure.**